

T³: Trustee Training Tips

Autumn 2003

Kentucky Department for Libraries & Archives

Volume 3

Number 4

IN THE BEGINNING

When a public library is established in Kentucky, its initial Board of Trustees is set up so as to create a “stagger” in the terms. The purpose is to maintain continuity by making sure all board members’ terms do not expire at the same time. The citation is KRS.173.040, 173.340, 173.490, or 173.730, depending upon under which statute the library was created. All apply the same one-third formula.

For those wishing to read for themselves the exact wording, the libraries established by petition (173.710) is as follows: “One-third (1/3) of the persons first appointed to the board shall serve for a term of two (2) years, one third (1/3) for a term of three (3) years, and one-third (1/3) for a term of four (4) years. Where the board consists of a number of members not divisible by three (3), one-third (1/3) of the next higher number divisible by three (3), shall serve for a term of two (2) years, one third (1/3) for a term of three (3) years, and the remaining number shall serve for a term of four (4) years.”

As most (100 out of 118) Kentucky public libraries have five member boards, we shall continue with that as our example. Let’s say XYZ Public Library was created in 1963. At that time two (2) trustees were appointed for a two-year term, due to expire in 1965; two (2) for a three-year term, due to expire in 1966; and one (1) for a four-year term, due to expire in 1967. After those initial appointments, all terms were locked in at four (4) years each. In our example, XYZ P L’s board was permanently in place with four-year terms by 1966. Thereafter, all appointments were made to fit the term structure established by statute when the library was created.

Why might this be important now? As Annual Reports are submitted and reviewed by KDLA staff, inconsistencies invariably show up in term dates. The confusion is likely caused by appointments made to fill unexpired vacancies. Trustees vacate terms for a variety of reasons, and new trustees are appointed to finish out the vacant terms. *This does **not** in anyway affect the dates of the term.* If XYZ P L’s terms run from July 1 to June 30, then all trustee terms will end on June 30 and no more than two terms will ever be set to expire in the same year.

Look at your Annual Report’s last few pages where trustee information is listed. If yours does not match the criteria above, contact your Regional Office for assistance in determining where discrepancies lie and the procedures to follow to correct them. Since trustee terms are set in Kentucky statute, boards should strive to be in compliance with these laws.

LIBRARY STANDARDS

This year's new and improved Annual Report asks if the *Kentucky Public Library Standards* have been reviewed. While "reviewed" can mean different things to different people, the intention of this question is to ask if the library has used this basic measurement to answer the perpetual question: how good is my library?

The *Kentucky Public Library Standards* was created in a joint effort between the Kentucky Department for Libraries and Archives (KDLA) and the Kentucky Library Association's (KLA) Public Library Section (PLS). It is entirely voluntary. It is self-administered. There are no rewards nor punishments attached to one's ranking.

The Standards are divided into the following eight (8) categories:

- Governance
- Personnel
- Access
- Collections
- Services
- Facilities
- Technology
- Marketing

They address each with three (3) levels of achievement: Basic, Comprehensive, and, Enhanced. (Think: good, better, & best.)

The combination of categories and levels allows considerable flexibility. A library can reach an Enhanced level in one category and a Basic in another. Dealing with one category at a time allows spreading the assessment out, eliminating the urge to rush through them quickly and, consequently, not giving each enough time for thorough discussion.

The Standards can be used however the library sees fit. Some Directors have filled

them out and presented them to their Boards for discussion. Others have merely copied the category *du jour* and led the board through a discussion to reach an agreement of the library's ranking. Whichever method your board elects to use, here is another good use of the *Twelve Month Agenda*—it allows planning the distribution of the workload so as not to over schedule any one month with too many time consuming tasks. [See "Plotting and Planning the Year Ahead", *T³: Trustee Training Tips*, Summer 2001] Although the format is an easy to use checklist, with Yes, No, Planned, and NA, allowing enough time to discuss each is important, as is drawing each trustee into the discussion.

Here is a sample of how an issue from the Governance category is presented throughout the levels of achievement: The Statement introducing the issue is, "The Library has a visionary strategic plan that is used to make management and organizational decisions." The Basic compliance would be, "The library has completed a recognized strategic planning process, such as ALA's *Planning for Results*, within the past five years." To reach the Enhanced level, the response would be, "The plan is reviewed and updated semi-annually by the board. A review of the library's progress toward meeting the plan's goals, objectives, and timetables is included in this review." And to achieve Comprehensive, a library would have to check, "An update on the library's plan implementation is included as a regular part of the monthly board agenda."

In existence slightly over a year, the *Kentucky Public Library Standards* have still not had widespread application. Perhaps now is the time to begin using them to measure your library's performance.

DOW DOWN? CIRC UP!

News Flash: the Dow-Jones dropped ____ number of points today. But if we had a similar national library barometer, it would very likely be reaching corresponding heights. An article in the *Sacramento Bee* last year is most encouraging as libraries contemplate budgets in this very difficult economy. It began with, "Want to make librarians laugh? Ask whether usage is down because so much information is available on the Internet. Once they stop rolling on the floor, you'll get your answer: No!" It goes on to extol the wonders of rising public library use.

Two national studies commissioned by ALA and released in 2002 show that Americans are using their libraries more than ever, and 91% of adults believe public libraries will play an important role in the future, despite all the information available on the Internet. Waukesha County (WI) Federated Library System recently replicated both studies locally and found, not surprisingly, very similar results.

The ALA press release notes that librarians have long believed that when the economy goes down, public library use goes up. But no one has been able to substantiate this belief with data—until recently. ALA contracted with the University of Illinois Library Research Center (LRC) to study library use over the last five years at 18 large urban libraries. They found that circulation had increased significantly since March 2001, when the National Bureau of Economic Research pegged the beginning of the latest recession. Using statistical analysis, the LRC found that circulation in March 2001 was 8.3% higher than would be expected from the trend observed since January 1997. Following the events of September 11, circulation in October 2001 exceeded the trend by 11.3%.

Waukesha County replicated the national study, as could any Kentucky public library, and came to the same conclusion—library use is counter-cyclical. This could be powerful ammunition in the ongoing fight to secure additional funding—federal, state, and local—for our libraries.

The ALA library use survey found that while current spending was \$25 per capita, 52% of those polled believe \$26-\$100 per capita should be spent to support libraries; Waukesha County's rate was an endorsement of 80% of those polled. The Waukesha County survey found 88% of residents rated their library's use of tax funds as good or excellent, almost exactly the same as was found nationally.

Having national data to support the idea that investing in libraries means investing in our future can be a powerful message. Think, too, how useful having *your* library's statistics could be as trustees advocate for libraries in general and your own specifically.

T³:Trustee Training Tips is published quarterly by the Field Services Division of the Kentucky Department for Libraries and Archives. Correspondence should be addressed to the editor, Nelda Moore, at Lincoln Trail Regional Office, 201 West Dixie Avenue, Suite One, Elizabethtown, KY 42701-1533. Phone 270.766.5222; Fax 270.766.5223; e-mail: nelda.moore@ky.gov.

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LIBRARY LETTERS

Dear Marian Librarian,

I am constantly confused by so many numbers quoted for each specific library law. How do I know which ones apply to my library?

-- Troubled Trustee

Dear Troubled,

You are not alone in your confusion. The KRS numbers you see in citations differ because public libraries in Kentucky were established differently. Most were formed as special taxing districts by the petition method and that makes them subject to 173.710. Those created as special taxing districts by the ballot method are under 173.470. Those that receive their funds from city or county government rather than a direct tax are under 173.310. And, finally, first-class cities can create libraries subject to 173.010. To know which to use, determine your establishment and follow the numbers that begin immediately after the decimal point.

**Kentucky Department for Libraries
and Archives
201 West Dixie Avenue Suite One
Elizabethtown KY 42701-1533**

HOW MUCH DO YOU KNOW?

The following quiz will let you test your knowledge on the topics covered in this publication. The answers are under "Publications" on KDLA's web page <www.kdla.net>.

1. Why is it a problem if our trustees' terms end during different months?
2. How might one go about "fixing" a situation were three members' second terms are set to expire 6-30-04?
3. What does a library receive once it achieves a Comprehensive rating in all eight categories?
4. Why would knowing your library's usage statistics be useful?
5. True or False: Our library was established as a taxing district by the petition method. As a governmental unit, it cannot hire relatives of the trustees as employees pursuant to KRS. 173.340.

ADDRESS CORRECTION REQUESTED
PLEASE FORWARD

Answers to T³ Quiz

1. *Why is it a problem if our trustees' terms end during different months?* [page one]

It's a problem because it indicates sometime in the past the statutorily mandated structure of your library board has gotten off track. The terms are stationary and do not change regardless of when they may be vacated. If the above situation is true for your board, then it is no longer complying with the law.

2. *How might one go about "fixing" a situation were three members' second terms are set to expire on 6-30-04?* [page one]

Contact your KDLA Regional Office, or the one assigned to you if yours is currently vacant, and explain your situation. KDLA maintains a trail of trustee appointments at the regional level as well as in Frankfort. While it may take some time, the appointments can be traced back to the original error. This will likely mean one of your board members will discover her term is going to expire before she thought it would. It might be less difficult to explain the problem and the potential outcome to the entire board before embarking on the trace. It is not as simple as asking which of the three trustees in question would be willing to serve a shortened term. Each term was legally appointed and it is only the one in documented error than can be fixed.

3. *What does a library receive once it achieves a Comprehensive rating in all eight categories?* [page two]

The feeling of pride and satisfaction in knowing your library qualified as one of the best in the state. Unfortunately there is no monetary reward, but hey, money can't buy happiness or that sense of accomplishment.

4. *Why would knowing your library's usage statistics be useful?*

Trustees are citizen advocates for library support and that includes seeking increased funding from federal, state, and local sources. To be able to present your library's importance to the community it serves, in an objective and documented way is an undeniable asset. As libraries compete with so many worthy causes, we need to show its unarguable worth. Also, being able to discuss library statistics in an informed manner can only boost the speaker's credibility. Know your material and speak with conviction. Print vital numbers on an index and carry it with you. It will be even more impressive if you can state your position without peeking at the card, but doing so in the name of accuracy is certainly acceptable.

5. *True or False: Our library was established as a taxing district by the petition method. As a governmental unit, it cannot hire relatives of the trustees as employees pursuant to KRS. 173.340.*

False. Although it is true there is a nepotism law that prevents trustees from allowing relatives to be on the library payroll, to quote KRS 173.340 as the reason makes the above statement false. As identified above, the library in question was formed under KRS 173.710 (taxing district by petition) and its anti-nepotism law would be KRS 173.740.